



Axiom Healthcare Suite 2017.1

Release Notes

Last Updated 5/1/2017

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Introduction

This document provides the list of changes to shared areas of the Axiom Healthcare Suite products, which includes:

- Suite-wide feature additions and changes
- Security changes
- Key platform changes

Each Axiom Healthcare Suite product also has their own separate release notes that provide additional details on features and fixes specific to that product. *Please review the release notes for each product licensed by your organization prior to upgrading.*

IMPORTANT: With the introduction of the new Dimension Maintenance utility in the 2017.1 release, upgrading any of the products from the 2017.1 Axiom Healthcare Suite will have a direct impact on each user's ability to edit dimensions for *all* products. *Any product upgrade you perform will alter the dimension edit security for all products.* For each product dimension, you will need to set up security for members that need to edit dimensions. After upgrading any Axiom Healthcare Suite product, all members—both administrators and general users—will still be able to read from the dimension tables. This means that each user can continue to report and plan normally, but *the user's ability to edit any dimension requires additional security setup.* Although we recommend that you upgrade all products at the same time, planning schedules may prevent you from doing so. Prior to upgrading any product, please coordinate with other product administrators.

Summary

Kaufman Hall is pleased to announce the 2017.1 release of Axiom Healthcare Suite. Each product release provides new features, enhancements, and configuration options that help meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Contact support@kaufmanhall.com or your implementation consultant, and they will confirm an installation period with you.
3. **Back up Axiom database** – Kaufman Hall will confirm that you have a current backup of your Axiom database before applying the upgrade.
4. **Apply upgrade** – Arrange with your IT staff on an agreeable time for scheduled downtime to apply the program and product upgrade. This includes any post-upgrade hot-fix files that need to be copied into the system to address any post-release known issues that have been resolved.
5. **Complete manual updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version. For more information, see [Manual setup instructions](#) in this document.

Support

As always, we appreciate your support of Kaufman Hall and look forward to continuing to meet your financial management needs. If you have any questions about your upgrade, contact Kaufman Hall Software Support at 1-888-543-6833 or support@kaufmanhall.com.

Training

Kaufman Hall offers multiple training options for our customers. These courses are part of your maintenance agreement and are free of charge. We strongly urge you to take advantage of all training options, including:

- Self-help videos
- Recorded webinars
- Virtual training courses

For a complete listing of our courses, please visit www.kaufmanhall.com.

Product upgrade notes

IMPORTANT: Refer to the respective Release Notes of each Axiom Healthcare Suite product licensed by your organization for product-specific considerations *before* upgrading. You must apply the Axiom Software Platform 2017.1 upgrade before applying any 2017.1 product upgrades. The Axiom Software Platform upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software Platform 2017.1 before the first product upgrade.

When upgrading to the 2017.1 version of Axiom Healthcare Suite, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, driver files, and remediated defects.
- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files will remain as is. Any required modifications to these areas are covered in the release notes.

New features summary

This section includes a summary of the new or updated features for this release:

- [New Dimension Maintenance utilities](#)
- [Process management - manage by group](#)
- [Security changes](#)
- [Axiom Software Platform updates](#)
- [Ribbon tab changes](#)

New Dimension Maintenance utilities

Dimensions are key fields in each data table. Each dimension also has its own table that includes a series of attributes (columns) for each element that further define the dimension. These columns are leveraged throughout various Axiom Healthcare Suite products in reports, planning processes, and plan file configuration. Some dimensions, such as the DEPT dimension, are shared between various products.

There was a need for additional security for the following reasons:

- To prevent product administrators from changing columns not related to their own product.
- To limit the records each user can edit so that you can decentralize your dimension maintenance with controlled element and product access.

There are two new utilities available to secure and manage dimensions: the Dimension Maintenance Security utility and the Dimension Maintenance utility.

Dimension Maintenance Security utility

Prior to this version, security was controlled at the Everyone role, granting full access (both read/write) to all members. The write access for all dimensions, except those in the exclusion list, have been modified to remove full write access for the dimension tables included in the Dimension Maintenance utility.

IMPORTANT: This means, that unless explicitly granted access, none of your product administrators can update records within their dimension tables. Access is granted using the Dimension Maintenance Security utility. For more information, see [Configuring edit \(write\) security for any dimension](#) in this document or the *Dimension Maintenance Utility Administrator Guide*.

Note the following:

- Only members of the Security Admin role have rights to the Dimension Maintenance Security utility.
- Security administrators need to set up security for each product admin that needs the ability to edit *any* dimension (e.g. those not listed in the [Dimensions table exceptions](#)).

Dimension Maintenance utility

The Dimension Maintenance utility allows product administrators for a local branch to manage grouping columns within the limits defined for that administrator by the security administrator. The Dimension Maintenance utility provides the following dimension controls:

- Restrict product admin members to editing only those records that fall within the defined filter for a particular dimension.
- Restrict product admin members to editing product specific grouping columns.
- Remove the ability to update dimension tables directly using Open Table in Spreadsheet (OTIS).
- Remove inapplicable dimension update tools from system and task panes.
- Provide the ability to automatically include any new grouping columns in the Dimension Maintenance utility.
- Provide the ability to associate custom defined grouping columns to specific product.

IMPORTANT: Your security administrator must first use the Dimension Maintenance Security utility to establish write filters for the listed dimension tables for all products and for all product administrators before your product administrators can update dimensions using the Dimension Maintenance utility for any product that is upgraded. For more information, see [Configuring edit \(write\) security for any dimension](#) in this document or the *Dimension Maintenance Utility Administrator Guide*.

Dimension Maintenance utility setup

The listing of available columns based on the selected product and table in the Dimension Maintenance utility is controlled by data sets. Each column within a dimension table is assigned to a product through a process outlined in the *Dimension Maintenance Utility Administrator Guide*. All standard columns have already been assigned for you as a result of the upgrade.

You need to assign each non-standard dimension grouping column to a product dataset for it to be included in the correct section within the Dimension Maintenance utility. All unassigned columns are listed in the unassigned section of the Dimension Maintenance utility based on the dimension table selected. This is accomplished directly through Table Edit menu. For more information, see the [Operating instructions](#) in this document or the *Dimension Maintenance Utility Administrator Guide*.

Dimensions table exceptions

The following dimension tables are *not* affected by this update and are *not* part of the Dimension Maintenance utility. Each of these dimensions retain:

- Full edit rights, per authorized user.
- Ability for direct Table Edit.
- Leverage existing edit tools as you have used in the past.

CalDate
CAPACCT
CODE
CPREQ Identity
CTReq
GLPeriod
GlobalSet
INITIATIVEID
MODEL
NODE
NODE_TYPE
PAYOR
POTrans
RFID
SCENARIO
Vendor

Dimension Maintenance utility impact

For all other dimensions tables included in the Dimension Maintenance utility, the following changes will occur:

- Security changes prevent table edit ability using OTIS. Instead, OTIS launches the dimension table in read-only mode.
- The ability to save changes to the dimension tables is revoked for *all* members until the security administrator configures permissions to members using the Dimension Maintenance Security utility.
- The product Admin task panes have been modified to include the Dimension Maintenance utility and to remove legacy dimension update tools.

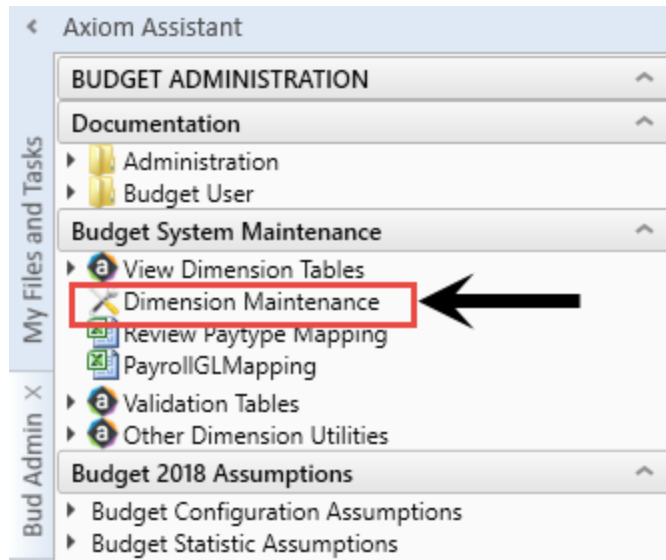
Security considerations

You *must* update the security for any dimension not listed in the [Dimensions table exceptions](#) section above before any member can edit those dimensions—regardless of the respective product that was updated.

NOTE: Any member with the **Admin** box selected in the **General** tab of the **Security Manager** is excluded from this consideration.

Dimension Maintenance utility access

Each product Admin task pane now includes an option to launch the Dimension Maintenance utility. The new task panes are *only* installed if you upgrade the respective product.



If you upgrade a partial set of products, the non-upgraded products will not receive the updated task pane. Those product administrators will need to access the Dimension Maintenance utility from the Axiom Explorer until the said time that product is upgraded to 2017.1. For more information, see [Editing a dimension](#) in this document or the *Dimension Maintenance Utility Administrator Guide*.

Direct table access

In the past, users could use OTIS for viewing and editing dimension tables. This functionality has now been restricted to read-only access for all product administrators. This was designed to promote the use of the Dimension Maintenance utility to enable filtered edit access. Product administrators can continue to use OTIS to view records outside of their edit filter. This information is especially useful when integrating planning processes.

Items in the task panes have been reworded to remind members that they can only view the tables. All dimension edits occur through the Dimension Maintenance utility.

Process management - manage by group

Prior to the 2017.1 release, each file group could only have one active process at a time. This upgrade allows you to configure the following:

- Multiple Process definitions per file group.
- Multiple active processes per file group.
- Each process definition can be filtered for specific set of plan files.
- Each Plan file should only belong to one process.
- Additional option to use one process, but stage the release of specific plan file segments by group. For example, a user has four campuses, but each campus releases their budgets at different times. The user, however, only wants to use one process. In previous releases, the user would need activate all the plan files, but in the 2017.1 release the user only needs to start groups of plan files, thereby preventing process errors due to incomplete plan file configuration.

1 Example of the process filter that restricts which plan files are included in this process definition.

2 The field to assign a Grouping column for staged release using a single process.

These two features are available in the Process Definition File for that file group.

IMPORTANT: Do not use multiple process definitions in the same file group without leveraging the Process Filter shown in 1 the above. Without filtered plan files per process definition, each process will include all plan files for each active process, thereby creating excess server activity and potential incorrect stage information since each plan file (ex. Dept) would be in multiple processes.

Security changes

Starting with version 2017.1, it is no longer possible to set file permissions at the file group level. The permission options are hidden when a file group node is selected. This will prevent future permissions from being defined at the file group level. Going forward, you must set all permissions at the folder and file level. During the upgrade, all related parent-level security is copied to the children.

Please note the following impact:

- Only members with the Admin checkbox selected will have direct system-browser access to the Plan Files folder or Calc Method Library. Typical access remains unchanged from the product task panes.
- The Everyone role was adjusted to remove write access to those dimensions configured within the Dimension Maintenance utility.
- All Product Admin roles have been configured to allow edit of the web-based Home Page.
- The Rolling Forecast User no longer has access to the Rolling Forecast Admin task pane.

IMPORTANT: For Axiom Capital Planning license holders, Axiom Capital Planning -2015 is no longer maintained by our updates. Due to the change in the Everyone role, you need to manually update the security for CapReq2015 if it is still an active file group (Adding new Capital Requests to that planning year). If applicable, for more information, see [Operating instructions](#).

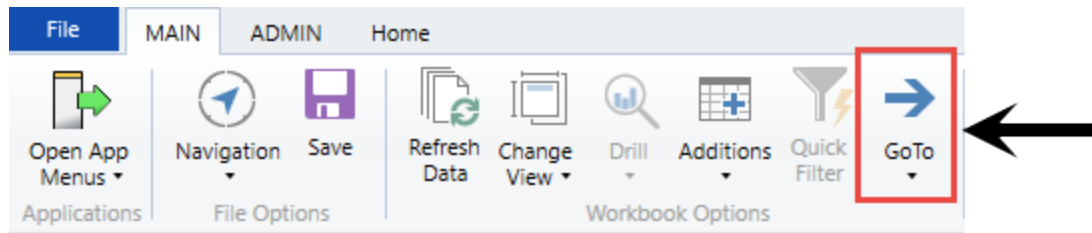
Axiom Software Platform updates

All product updates have been designed and configured for any platform enhancement as part of each product upgrade. To learn more about the features and updates for 2017.1 Axiom Software Platform, see the Axiom Software Platform 2017.1 release notes.

IMPORTANT: A platform upgrade is required for any product update. All products are backwards compatible if they are not upgraded at the same time.

Ribbon tab changes

In the Main ribbon tab, the GoTo option has moved from under the Navigation drop-down to stand alone in the Workbook Options section for easier access.



Upgrade considerations

The following table describes upgrade considerations that your product administrator should review to determine the appropriate course of action:

IMPORTANT: Apply the 2017.1 upgrade *only* if you have already applied the 2016.4 (November 2016) release and completed all of the manual setup steps from the corresponding release notes

Product	Considerations
Axiom Software Platform	Upgrade at any time.
Axiom Budget Planning	In an active Budget cycle: Wait to upgrade. Not in an active Budget cycle: Upgrade.
Axiom Performance Reporting and Productivity	Upgrade at any time.
Axiom Rolling Forecasting	Upgrade at any time.
Axiom Financial Planning	Do <i>not</i> upgrade.
Axiom Cost Management	Upgrade at any time.
Axiom Capital Planning and Capital Tracking	In an active Capital Planning cycle: Wait to upgrade. Not in an active Capital Planning cycle: Upgrade.
Axiom Cost Accounting	Contact your Kaufman Hall Implementation Consultant. This upgrade requires data manipulation and process change. Your consultant will discuss the options with you.
Axiom Decision Support	Contact your Kaufman Hall Implementation Consultant. This upgrade requires data manipulation and process change. Your consultant will discuss the options with you.

Known issues resolved in 2017.1

The following tables list the resolutions for known issues addressed in 2017.1, released on March 17, 2017:

Issue Description	Resolution
Rolling Forecast user has access to Rolling Forecast Admin task pane.	Corrected
Product admins do not have the ability to update web-based Home Page.	Corrected
When cloning file groups, rebuildable driver data did not copying to the new driver files.	Corrected
Product admins need access to Administer Locked items	Corrected

Known issues resolved in 2017.1.1

The following table lists the resolutions for known issues addressed in 2017.1.1, released on May 1, 2017:

TFS No.	Issue Description	Resolution
11578	Issue with 2017.1.0 package updating the Financial Planning User Role.	Corrected
12127	For Axiom Cost Accounting, the security setting needs to be set up for drill sheets for Costing reports.	Corrected
12137	Axiom Decision Support Admin members do not have access to EncounterCustom.	Corrected

Manual setup instructions

There are no manual setup instructions required for this release.

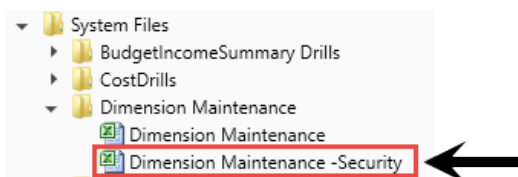
Operating instructions

This section includes instructions on how to use the new and updated features for Axiom Healthcare Suite for release 2017.1.

- [Configuring edit \(write\) security for any dimension](#)
- [Assigning an existing grouping column to a dataset \(product\)](#)
- [Configuring the Dimension Maintenance utility for non-standard columns](#)
- [Editing a dimension](#)
- [Process Management Definition Filter \(Optional\)](#)

Configuring edit (write) security for any dimension

1. In the **Explorer** task pane, in the **Reports Library** section, select **System Files > Dimension Maintenance**, and double-click **Dimension Maintenance - Security**.



2. Do one of the following:
 - In the **Main** ribbon tab, click **Refresh Data**.
 - Press **F9**.
3. In the **Refresh Variables** dialog, in the **Select a Product** drop-down, select the product to display for the respective product administrators, and click **OK**.
4. The **Maintenance - Security** screen displays a list of product administrators based on the product selected. Establish a write filter for each dimension table, as applicable.
5. Use any grouping column to establish security filters per dimension.
6. If no restrictions are needed, use a universal filter such as `Dept>=0`.
7. If the user is set to **NotConfigured**, it means the user cannot edit that table. For any member for that dimension you do not want to provide edit rights, leave them as **NotConfigured**.

NOTE: For more information, see the *Dimension Maintenance Utility Administrator Guide*. You can find this guide at www.kaufmanhall.com/support/training/documentation under KHA-EPM Software Suite.

Assigning an existing grouping column to a dataset (product)

To assign an existing grouping column to a dataset (product):

1. In the **Explorer** task pane, in the **Libraries** section, click **Table Library > !Dimensions**.
2. Right-click a dimension, and select **Edit table structure**.
3. In the **Edit Table** dialog, click the **Columns** tab.
4. In the list of columns, select a column to assign, and click the **Assign Column to Data Sets** button.
5. In the **Data Set Assignment** dialog, in the list of datasets (products) that have predefined for you, select the checkbox next to the products to assign this grouping column to, and click **OK**.

The following table lists each product and their corresponding product node:

Product	Product Node
Budget Planning	BP
Financial Planning	FP
Rolling Forecasting	RF
Cost Accounting	Cost
Cost Management	CM
Capital Planning	CP
Decision Support	DSS
Capital Tracking	CT
Performance Reporting	PR
Available to all related products	General

Configuring the Dimension Maintenance utility for non-standard columns

Configure the utility to assign any custom dimension grouping column to their respective products.

To assign an existing grouping column to a dataset (product):

1. In the **Explorer** task pane, in the **Libraries** section, click **Table Library > !Dimensions**.
2. Right-click a dimension, and select **Edit table structure**.

3. In the **Edit Table** dialog, click the **Columns** tab.
4. In the list of columns, select a column to assign, and click the **Assign Column to Data Sets** button.
5. In the **Data Set Assignment** dialog, in the list of datasets (products) that have predefined for you, select the checkbox next to the products to assign this grouping column to, and click **OK**.

Editing a dimension

The following is an example of the Dimension Maintenance utility screen for the DEPT dimension table:

<div> <div>KH Home</div> <div>Dimension Maintenance (R/O) x</div> </div> <div> <div>Maintenance</div> <div>Dimension : Dept</div> <div>DataSet filter : (DataSetName IN ('General','BP') OR DataSetName = '')</div> <div>(*) the column is duplicate. Only the first instance will be saved back</div> </div>				
General				
Dept	Description	Entity	CostCenter	RptMap VP
99	Test Dept	2	99	0 Me
10000	EHS Balance Sheet	1	0	10000 Tom Gilbert
10001	Security Test DEPT	1	10001	10001 Tom Gilbert
15000	EHS Deductions from Revenue	1	5000	15000 Howard Burns
15300	EHS Other Revenue	1	5300	15300 Howard Burns
15400	EHS Other NonOperating Revenue	1	5400	15400 Howard Burns
17840	EHS Sports Medicine	1	7840	17840 Steve Jackson
17870	EHS *** Bldg-Med Office/East Hplex	1	7870	17870 Howard Burns
17879	EPG Clinic Administration	3	7879	17879 Dr Johnson
17880	EPG Phys Clinic-North	3	7880	17880 Dr Johnson
17881	EPG Phys Clinic-Occ Hlth East	3	7881	17881 Dr Johnson
17883	EPG Phys Clinic-Occ Hlth Midtown	3	7883	17883 Dr Johnson
17885	EPG Phys Clinic-East	3	7885	17885 Dr Johnson
17886	EPG Phys Clinic-Occ Hlth/West	3	7886	17886 Dr Johnson
17891	EPG Phys Clinic-South	3	7891	17891 Dr Johnson
17894	EPG Phys Clinic-Uptown	3	7894	17894 Dr Johnson
17895	EPG Phys Clinic-West	3	7895	17895 Dr Johnson
17896	EPG Phys Clinic-Peds Afterhour	3	7896	17896 Dr Johnson
18560	EHS Rental	1	8560	18560 Steve Smith

Based on the selection, the Dimension Maintenance utility does the following:

- Builds all of the columns assigned to that product.
- Lists editable records that fall within the filter defined for you by your security administrator
- Enables double-click selection for validated columns (with pre-defined values).
- Lists suite-wide used columns under the General section, followed by product specific columns.
- Includes custom defined columns to the right (until these columns are assigned a data set)
- Lists existing records on the Dimensions_Maintenance tab.
- Provides ability to add new records in the Add_New_Dimension tab

To edit a dimension:

1. Depending on the product you are using, do the following:

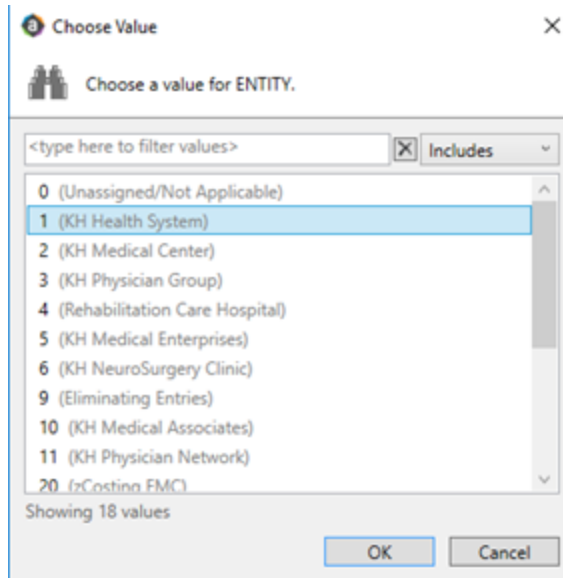
Product	Steps
Budget	In the Bud Admin task pane, in the Budget System Maintenance section, double-click Dimension Maintenance .
Capital Planning	In the Cap Plan Admin task pane, in the Administration section, double-click Dimension Maintenance .
Capital Tracking	In the Cap Track Admin task pane, in the Administration section, double-click Dimension Maintenance .
Cost Accounting	In the Cost Admin task pane, in the Costing Structure Maintenance section, double-click Dimension Maintenance .
Cost Management	In the CM Admin task pane, in the System Maintenance section, double-click Dimension Maintenance .
Decision Support	In the DSS Admin task pane, in the Decision Support Imports and Data Maintenance section, double-click Dimension Maintenance .
Financial Planning	In the Fin Plan Admin task pane, in the Administration section, double-click Dimension Maintenance - Integration Mapping .
Management Reporting	In the Mgmt Admin task pane, in the Dimension & Reference Maintenance section, double-click Dimension Maintenance .
Productivity	In the Prod Admin task pane, in the System Settings section, double-click Dimension Maintenance .
Rolling Forecasting	In the RF Admin task pane, in the Dimension Updates section, double-click Dimension Maintenance .

2. In the **Refresh Variables** dialog, in the **Select The Product To Edit** drop-down, select the product.

NOTE: The list of products that display are determined by the Axiom product licenses that your organization owns.

3. In the **Select a Dimension to Edit** drop-down, select the dimension, and click **OK**.

4. In the **Maintenance** utility, do any of the following:
 - In the blue cells, type any value according to the rules of the column.
 - In the gray cells, to edit the grouping column, double-click a cell.
 - In the **Choose Value** dialog, select a new value, and click **OK**.



5. After you finish making your changes, in the **Main** ribbon tab, click **Save**.

NOTE: If a column is missing, then it is assigned to a different dimension or not assigned. For more information, see [Assigning an existing grouping column to a dataset \(product\)](#).

Process Management Definition Filter (Optional)

For Detail configuration instruction, please see the 2017.1 Axiom Software Platform Release notes – Process Management Section.

Known issues

The following table lists the known issues in this release:

Issue Description	Explanation
The CapReq2015 dimension no longer has write access due to the change in security.	<p>If this is an active file group (requests being added), you need to manually update security by doing the following:</p> <ol style="list-style-type: none">1. In the Security Manager, select the <Everyone> role.2. Click the Tables tab.3. Click Dimensions, and select CapReq2015.4. Select the Full Access checkbox.5. Click Apply or Close.
The Dimension Maintenance utility may be accessible to the Analyst role from the product task pane.	The data population is driven by Dimension Maintenance Security of which Analyst role is not included. Although a user with the Analyst role can access the utility, data will not display and the user will not be able to save.